

2010

Dietary Supplement Manufacturers

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Dietary Supplements Manufacturers WESTERN EUROPE

COUNTRIES STUDIED

- **GERMANY**
- **BELGIUM**
- **UNITED KINGDOM**
- **FRANCE**

DESCRIBING IN THE REPORT

MARKET

19 COMPANIES IN GERMANY

7 COMPANIES IN BELGIUM

**7 COMPANIES IN THE
UNITED KINGDOM**

11 COMPANIES IN FRANCE

EXAMPLE OF COMPANY PROFILE

Arkopharma
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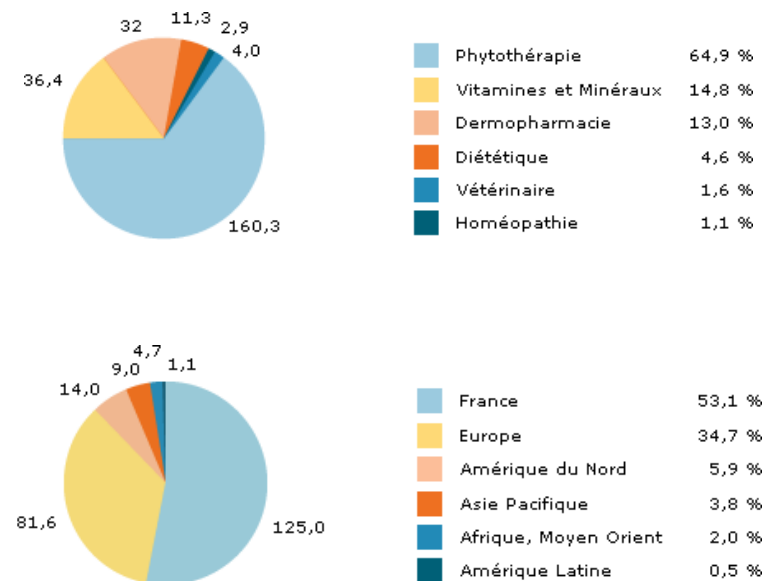
Company presentation

The drugs for "beauty", fruits of phytotherapy, propose basic treatments of which the softer actions will help preventing diseases and dealing with chronic problems such as arthritis or insomnia. For that, phytotherapy works in the deep, without attacking the organism and by stimulating its good reactions. Result: a more effective, durable and most importantly, without side effects.

Arkopharma laboratories propose more than 400 references and together they can cover the fields of self medicated, healthy beauty.

5% of Arkopharma Groups turnover is devoted to Research and the Development. Arkopharma holds 1639 inscriptions and Marketing authorizations (A.M.M) of drugs and 100 scientists work within the Research and Development department.

CA 235 M€
Répartition du chiffre d'affaires:



Dietary Supplements Manufacturers EASTERN EUROPE

COUNTRIES STUDIED

- **RUSSIA**

DESCRIBING IN THE REPORT

MARKET

40 COMPANIES

EXAMPLE OF COMPANY PROFILE

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Commercial Director: Nina Vikhrieva
International Business Managers: Tatiana Khromushina – tanya@ekomir.ru (English), Alena Korteve – alena@ekomir.ru (English, German)

Company presentation

"Ekomir" – is the pharmaceutical company, specialized in the development of innovative nutraceuticals, cosmeceuticals and functional beverages of high quality and efficacy proven in clinical trials. In just 4 years Ekomir has moved ~50 places in the rankings and now stands in top 10 of leading national and foreign manufactures in Russia.

Development of the products, for diseases prevention, health and life quality improvement is our mission.

Ekomir was founded in 1996. In 2000 our company entered the world dietary supplements market with "**The Sea calcium**" line, and the assortment has significantly widened within the next years. Since 2003 when the company had entered the market with its "**Lutein-Complex**" the popularity of the last has been steadily growing. According to the DSM Group Retail Audit Data the "Lutein-Complex" is one

of the 5 best dietary supplements sellers in cost volume pharmaceutical sales in Russia, and according to the results of May 2008 year took 1st place among all lutein containing products in Russia.

Nowadays the two innovative medications have significantly firm positions in their category and continue gaining the loyalty of the final customers as well as the doctors. Clinical researches confirmed high efficacy of "**Likoprofit**" (urology) and "**Bora Bora**" (arthrology). Great results in complex therapy of diabetes mellitus and its complications showed "**Coffeeberry**" – the unique plant antioxidant from the whole coffee berry extract and natural Vitamin C.

The new line with actual motto "**new quality of life**" with such products like "**Hoodia slim**", "**Energy Active**", "**Relax Comfort**" and "**Coenzyme beauty**" has recently replenished the product family of the company.

Ekomir is also entering the new segment – the **cosmeceuticals** market, having produced the exclusive "premium –class" product- "**Myoderm**" lifting-gel and the cosmetics line of 11 items with the unique component formula, produced with nanotechnology.

Ekomir is today a dynamically developing group of companies constantly capturing market position. The Ekomir products are unique combinations of leading botanical extracts, essential vitamins and minerals. Many of which have been proven in clinical trials and the results published in peer reviewed journals. Ekomir puts a lot of effort in ensuring the best quality of their products sourcing materials from only world leading manufacturers such as DSM (Switzerland), Naturex (France), Futureceuticals (USA), Biopharma (USA).

Ranking among all domestic and foreign manufacturers (567 by July'07) by pharmacy sales of food supplements:*

- **2003** - 54th position (Moscow)
- **2004** - 17th position (Moscow)
- **2005** - 7th position (Moscow) - 13th position (Russia)
- **2006** - 6th position (Moscow) - 8th position (Russia)
- **2007** - 7th position (Russia)
- **March 2008 - 6th position (Russia) *according data DSM Monitoring Group**

In July 2007 there were 3588 Food Supplements items sold in Russian market

Products

Lutein complex Lutein Forte CoffeeBerry
Bora Bora Sea calcium Sea calcium
kids
Estrovel Teagal
Lutein complex
kids
Food Supplements Product List
Antocyan Forte
Lycoprofit
Lykoprofit Coenzyme Beauty Hoodia Slim
potential
Energy Active Relax Comfort

Launch of "Beauty from within" line – 4 products

- Launch of probiotics – 4 products
- Launch of functional beverages: CoffeBerry & Coenzyme Q10
- Launch of OTC products: Lutein Zeaxanthin and CoffeBerry

Dietary Supplements Manufacturers ASIA

COUNTRIES STUDIED

- JAPAN
- CHINA

DESCRIBING IN THE REPORT

MARKET

6 COMPANIES IN JAPAN

15 COMPANIES IN CHINA

EXAMPLE OF COMPANY PROFILE

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Tokyo Stock Exchange Code: 4921

Company presentation

FANCL introduced preservative-free cosmetics to eliminate cosmetics-related skin problems. Our entire business is built on the philosophy of eliminating negative issues that detract from the quality of life.

Cosmetics should enable the user to enjoy both sensual pleasures of use and the resulting joy of beauty. This is the goal that drives our research and development. Analysis of the skin's cellular structure and evaluation of texture and ease of application produce highly effective products. New technologies have enabled us to increase the volume of product without adding preservatives and develop hermetically sealed containers to prevent product deterioration. These unique, state-of-the-art technologies enabled us to introduce new revolutionary high-volume versions of our preservative-free products in 2002. Offering product lines aimed at specific skin types, ages, men, and babies, we aim to eliminate cosmetics-related dissatisfactions for consumers of every skin type and every age.

Manufactured in clean facilities that rival standards set for medical products, products reach our customers at the height

of freshness due to our rapid, efficient distribution systems. Never content with the status quo, we constantly seek new levels of reliability, safety, and gentleness as we continue to pioneer the field of preservative-free products.

Activity: Cosmetics (46%), Supplement (31%), other (23%) Ratio of Sales

Nutritional Supplements

Ideally, nutritional supplements should be consumed on a daily basis. In the past, however, high prices were a barrier to daily consumption. FANCL was able to pass on significant price reductions through direct purchasing of materials, development of simple aluminum packaging, and utilization of the mail-order system developed for our cosmetics business to deliver quality products produced in our own facilities.

Today, as a result, everyone can enjoy the benefits of quality nutritional supplements.

We do not stint on research, using only ingredients and materials scientifically proven effective and safe. We verify absorbency, ease of consumption, and marketability.

We were also the first to develop capsules produced exclusively from vegetable matter, adopting them for all of our products from May 2002. As of May 2002, we offer a total of 81 items divided according to nutritional value and specific health objectives into eight product categories. Regular introduction of new items boosts the competitive advantage of our nutritional supplements.

Our beauty and diet products, developed from the unique FANCL perspective of inner and outer beauty, also enjoy a popular following.

Our aim is to contribute to the health and well-being of each and every customer, by offering quality products to meet a wide variety of nutritional needs.

FANCL shows supply countries which supplies ingredients of supplement at part of products.

Supplement Category

1. Vitamin & Mineral Supplement
2. Beauty Supplement
Collagen, Skin Whitening (L-Cysteine), Hyaluronic acid,
HTC Collagen 1080 tables (4200 JP Yen)
3. Multi nutritional Supplement
Nutritional Supplement
Multi Amino Acid 1350 tablets (6195 JP Yen)
4. Dietary Supplement
Alpha-lipoic acid, L-carnitine, L-ornithine
5. Functional Supplement
Royal jelly, Soybean lecithin, EPA, DHA, Chitosan, Propolis
6. Herb Supplement
Soybean isoflavone, Ginkgo leaf, Curcuma longa, Asian
ginseng, Garlic, St. John's wort, Maca

Dietary Supplements Manufacturers USA

COUNTRIES STUDIED

- USA

DESCRIBING IN THE REPORT

MARKET

17 COMPANIES

EXAMPLE OF COMPANY PROFILE

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www.leinerhealthproducts.com

Company presentation

- *Leiner Health Products is the nation's largest manufacturer and marketer of vitamins, minerals and nutritional supplements and one of the largest manufacturers of private label over the counter ("OTC") pharmaceuticals. Leiner markets over 480 vitamins and OTC pharmaceuticals in more than 6,000 stock keeping units through the mass market and other channels.*
- *The Company estimates that it has a 50% share of private label vitamin sales (more than two times the size of the next largest competitor) and a 25% share of all mass market vitamin product sales in the United States (50% larger than the nearest competitor). Vitamin product sales represent approximately 80% of the Company's sales. The Company attributes its leading position in the vitamin industry to its combination of a low cost manufacturing position, high quality, science based products, advanced management systems and high levels of customer services.*
- *The Company's vitamin products are sold in all 50 states through more than 50,000 retail outlets. The Company's vitamin product customers are primarily mass market*

retailers and include the country's 20 largest drug store chains (including Walgreen's, American Stores, Eckerd, CVS, Rite-Aid and Revco), 18 of the 20 largest supermarket chains (including Safeway, Winn-Dixie, Albertson's, A&P and Lucky Stores), the 10 largest mass merchandising chains (including Wal-Mart, Target, Kmart and Venture) and the two largest warehouse club chains (Sam's and Costco).

- **Vitamin Products.** *The Company sells a full line of vitamin products, including approximately 370 products in more than 4,400 SKUs. The Company's products are sold in tablet and capsule forms, and in varying sizes with different potencies, flavors and coatings.*
- **OTC Pharmaceuticals.** *The Company markets over 100 different OTC Pharmaceutical products in over 1,575 SKUs, including products comparable to most major national brands in the analgesic, cough and cold remedy and digestive aid categories.*

Leiner position itself to take a lead position in store-brand vitamins and herbals. It markets mixtures of herbs and vitamins targeting specific problems. Vitamins private label sales account for 62 percent of that business.

In 1999, Leiner launched Syndrox, a dietary supplement designed to promote balance metabolism.

*In July 2000, Leiner acquired **California Day-fresh Foods inc**, Glendora, CA (Naked Juice brand), a company marketing functional drinks. California Day-fresh Foods manufactures fresh juice for mass market and health food channels. A main goal is expanding its distribution in the United States.*

New to the company is its herbal line, the first three of which debuted in April 1998. These products "Nirvana" with astragalus, Siberian ginseng, St. John's Wort and kava kava, "ZippiTea," a green tea blend with Siberian ginseng, gotu kola, bee pollen and ginkgo biloba "Wise Guy" with cranberry juice, ginger and ginkgo biloba—did so well that the company in January introduced "Herbal Well Being," which includes echinacea, astragalus, vitamin C and zinc. "Naked antioxidants" : a mix of orange, carrot and banana fortified in antioxidants, vitamins and selenium.

The company has also done well in its "Super Foods" line, for which it debuted "Mojave Magic" at Expo West. Mojave Magic incorporates nopal, aloe vera and agave cacti with psyllium for a digestive aid that is also cholesterol lowering. Mojave Magic joins "Green Machine" and "Protein Zone" (soy and whey proteins) in the Super Foods line.

"Green Machine contains 11 different superfoods, including spiruline, blue green algae and chlorella"

"Tidal wave" includes omega 3 and 6 and blue green algae, as well as spiruline.

Leiner included tocotrienol in its multivitamins products a few years ago, but the difference was not sensible. The difficulty with tocotrienols, like with vitamin E, is that it has a long term effect while the consumer likes to see that it works on a short term. Science is difficult to sell to consumers, until they feel from their own experience. Also, they are so many antioxidants that the consumer has difficulty to differentiate them.